

Amendments To Claims:

This listing of claims will replace all prior versions, and listings, of claims in the application:

Listing of Claims:

1 (currently amended) A method for generating account statements for batch printing, comprising:

grouping a plurality of accounts for which account statements are to be generated in a batch printing run;

receiving, at a computer, account data for each of the plurality of accounts, the account data for use in generating at least one account statement for each of the plurality of accounts;

presenting, to a user, a plurality of reporting formats that are available to be assigned to at least one of a plurality of account statements, each of the plurality of reporting formats defining a printed layout of the account data for the account statements parameters relating to a report layout, a report delivery method, and a report assembly method;

receiving, from the user, a selection of a first account from the plurality of accounts, and a selection of a first reporting format for the first account and a second reporting format for the first account from the plurality of reporting formats for the first account;

updating, by said computer, a report order table with a first model identifier corresponding to the selection of the first reporting format and a second model identifier corresponding to the selection of the second reporting format, wherein the first model identifier and the second model identifier are each associated with one of the plurality of reporting formats;

receiving, from the user, a selection of a second account from the plurality of accounts, and a selection of a ~~second~~ third reporting format for the second account and a fourth reporting format for the second account from the plurality of reporting formats for the second account;

updating, by the computer, the report order table with a third model identifier corresponding to the selection of the third reporting format and a fourth model identifier corresponding to the selection of the fourth reporting format, wherein the second account first model identifier and the second account second model identifier are each associated with one of the plurality of reporting formats;

receiving, from a user, a designation for corporate review corresponding to at least one of: the first account and the second account, wherein said designation for corporate review is stored with statement parameters;

retrieving, by said computer, the statement parameters applicable to the account statements, wherein the statement parameters include a recipient list, statement description, statement type, statement status, a number of copies to be generated, the designation for corporate review, and a designation for internal copies;

assembling, by said computer, a directory of individual account statements, wherein said directory of individual account statements includes the designation for corporate review;

~~displaying the directory of individual account statements assembled for the batch printing run;~~

performing, by said computer, an automatic review of the individual account statements based on said statement parameters;

performing, by said computer, an automatic approval the individual account statements in response to said individual account statements being compliant with said statement parameters;

preventing the batch printing run until all individual account statements within the batch printing run are approved and released based on said automatic review;

receiving, from a reviewer, a selection of an account statement from the directory for review;

presenting the selected account statement to the reviewer;

receiving, from the reviewer, at least one of: an approval of the selected account statement, a rejection of the selected account statement, a correction of the selected account statement, a request for regeneration of the selected account statement, and a request to delete the selected account statement;

releasing the selected account statement for the batch printing run; ~~and,~~

retrieving, from the report order table, the first model identifier, the second model identifier, the third model identifier, and the fourth model identifier to generate batch print instructions;

generating, in accordance with the statement parameters and the batch print instructions, a first account statement for the first account, a second account statement for the first account, a third account statement for the second account, and fourth account statement for said second account; ~~and in the first reporting format for the first account and a second account statement in~~

~~the second reporting format for the second account, said first and second account statements for printing in the batch printing run~~

delivering, in accordance with the statement parameters and the batch print instructions, the first account statement, the second account statement, the third account statement, and the fourth account statement.

2. (original) The method of claim 1, said grouping further comprising:
grouping the plurality of accounts based on a group designation selected by the user.
3. (currently amended) The method of claim 2, ~~said first and second account statements~~
wherein at least one of: the first statement, the second statement, the third statement, and the fourth statement comprises ~~comprising~~ at least one of a billing statement, a credit card statement, and a summary of investment holdings.
4. (currently amended) The method of claim 3, ~~said wherein the~~ account data is retrieved from a financial database.
5. (currently amended) The method of claim 4, further comprising:
receiving, from the user, a correction of the account data for at least one of: the first account and the second account, wherein the correction is entered into the financial database.
6. (currently amended) The method of claim 5, further comprising:
receiving, from the user, a selection of the second reporting format for the first account;
and
generating a fifth statement for a third account statement and sixth statement for the third account in at least one of: the third reporting format or fourth reporting format ~~second reporting format~~ for the first account, ~~said first, second and third account statements~~ the first statement, the second statement, the third statement, the fourth statement, the third account first statement, and the third account second statement for printing in the batch printing run.
7. (previously presented) The method of claim 6, further comprising:

receiving, from the user, a selection of a third reporting format from the plurality of reporting formats for the second account; and

generating a third account statement in the third reporting format for the second account, said first, second and third account statements for printing in the batch printing run.

8. (currently amended) The method of claim 7, further comprising:

designating at least one of the first statement, the second statement, the third statement, the fourth statement, the fifth statement, and the sixth statement ~~first and second account statements~~ for quality review.

9. (currently amended) The method of claim 8, ~~further comprising:~~

~~receiving, from the user, a parameter for generating the first and second account statements, the parameter including wherein said report order table includes fields for~~ at least one of: a time period for said account statements, a status of the accounts corresponding to said account statements, a corporate group responsible for the accounts, a number of copies of the account statements to be printed in the batch printing run, and a designation of whether the account statements are to undergo quality review.

10. (previously presented) The method of claim 9, further comprising:

printing the batch printing run after said generating and a completion of a quality review for all designated account statements in the batch printing run.

11. (currently amended) A computer-readable medium having stored thereon a plurality of instructions, the plurality of instructions comprising method for generating account statements for batch printing, comprising:

instructions to group ~~grouping~~ a plurality of accounts for which account statements are to be generated in a batch printing run;

instructions to receive ~~receiving~~, at a computer, account data for each of the plurality of accounts, the account data for use in generating at least one account statement for each of the plurality of accounts;

instructions to present ~~presenting~~, to a user, a plurality of reporting formats that are available to be assigned to at least one of a plurality of account statements, each of the plurality

of reporting formats defining a ~~printed layout of the account data for the account statements~~
parameters relating to a report layout, a report delivery method, and a report assembly method;

instructions to receive receiving, from the user, a selection of a first account from the plurality of accounts, and a selection of a first reporting format for the first account and a second reporting format for the first account from the plurality of reporting formats for the first account;

instructions to update, by said computer, a report order table with a first model identifier corresponding to the selection of the first reporting format and a second model identifier corresponding to the selection of the second reporting format, wherein the first model identifier and the second model identifier are each associated with one of the plurality of reporting formats;

instructions to receive receiving, from the user, a selection of a second account from the plurality of accounts, and a selection of a ~~second~~ third reporting format for the second account and a fourth reporting format for the second account from the plurality of reporting formats for the second account;

instructions to update, by the computer, the report order table with a third model identifier corresponding to the selection of the third reporting format and a fourth model identifier corresponding to the selection of the fourth reporting format, wherein the second account first model identifier and the second account second model identifier are each associated with one of the plurality of reporting formats;

instructions to receive receiving, from a user, a designation for corporate review corresponding to at least one of: the first account and the second account, wherein said designation for corporate review is stored with statement parameters;

instructions to retrieve retrieving, by said computer, the statement parameters applicable to the account statements, wherein the statement parameters include a recipient list, statement description, statement type, statement status, a number of copies to be generated, the designation for corporate review, and a designation for internal copies;

instructions to assemble assembling, by said computer, a directory of individual account statements, wherein said directory of individual account statements includes the designation for corporate review;

displaying the directory of individual account statements assembled for the batch printing run;

instructions to perform, by said computer, an automatic review of the individual account statements based on said statement parameters;

instructions to perform, by said computer, an automatic approval the individual account statements in response to said individual account statements being compliant with said statement parameters;

instructions to prevent preventing the batch printing run until all individual account statements within the batch printing run are approved and released based on said automatic review;

instructions to receive receiving, from a reviewer, a selection of an account statement from the directory for review;

instructions to present presenting the selected account statement to the reviewer;

instructions to receive receiving, from the reviewer, at least one of: an approval of the selected account statement, a rejection of the selected account statement, a correction of the selected account statement, a request for regeneration of the selected account statement, and a request to delete the selected account statement;

instructions to release releasing the selected account statement for the batch printing run;
and,

instructions to retrieve, from the report order table, the first model identifier, the second model identifier, the third model identifier, and the fourth model identifier to generate batch print instructions;

instructions to generate generating, in accordance with the statement parameters and the batch print instructions, a first account statement for the first account, a second account statement for the first account, a third account statement for the second account, and fourth account statement for said second account; and in the first reporting format for the first account and a second account statement in the second reporting format for the second account, said first and second account statements for printing in the batch printing run

instructions to deliver, in accordance with the statement parameters and the batch print instructions, the first account statement, the second account statement, the third account statement, and the fourth account statement.

12. (currently amended) The computer-readable medium method of claim 11, said grouping further comprising:

instructions to group grouping the plurality of accounts based on a group designation selected by the user.

13. (currently amended) The computer-readable medium method of claim 11, ~~said first and second account statements~~ wherein at least one of: the first statement, the second statement, the third statement, and the fourth statement comprises ~~comprising~~ at least one of a billing statement, a credit card statement, and a summary of investment holdings.

14. (currently amended) The computer-readable medium method of claim 11, ~~said~~ wherein the account data is retrieved from a financial database.

15. (currently amended) The computer-readable medium method of claim 14, further comprising:

instructions to receive receiving, from the user, a correction of the account data for at least one of: the first account and the second account, wherein the correction is entered into the financial database.

16. (currently amended) The computer-readable medium method of claim 11, further comprising:

instruction to receive receiving, from the user, a selection of the second reporting format for the first account; and

instructions to generate generating a third account first statement and third account second statement in at least one of: the third reporting format or fourth reporting format ~~second reporting format~~ for the first account, ~~said first, second and third account statements~~ the first statement, the second statement, the third statement, the fourth statement, the third account first statement, and the third account second statement for printing in the batch printing run.

17. (currently amended) The computer-readable medium method of claim 11, further comprising:

instructions to receive receiving, from the user, a selection of a third reporting format from the plurality of reporting formats for the second account; and

instructions to generate ~~generating~~ a third account statement in the third reporting format for the second account, said first, second and third account statements for printing in the batch printing run.

18. (currently amended) The computer-readable medium ~~method~~ of claim 11, further comprising:

instructions to designate ~~designating~~ at least one of the first statement, the second statement, the third statement, the fourth statement, the third account first statement, and the third account second statement ~~first and second account statements~~ for quality review.

19. (currently amended) The computer-readable medium ~~method~~ of claim 11, further comprising:

~~receiving, from the user, a parameter for generating the first and second account statements, the parameter including~~ wherein said report order table includes fields for at least one of: a time period for said account statements, a status of the accounts corresponding to said account statements, a corporate group responsible for the accounts, a number of copies of the account statements to be printed in the batch printing run, and a designation of whether the account statements are to undergo quality review.

20. (currently amended) The computer-readable medium ~~method~~ of claim 9, further comprising:

instructions to print ~~printing~~ the batch printing run after said generating and a completion of a quality review for all designated account statements in the batch printing run.

Claims 21-22 (canceled)